

OCASI PROFESSIONAL DEVELOPMENT
CONFERENCE

**Case Management Skills &
Practices Workshop**

By

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OBJECTIVE

- ✓ Explore Case Management philosophy
- ✓ Review client centered rather than service centered approach using ISP (Individual Service Plan)
- ✓ Explore internal standards and practices: case note, file documentation and report writing
- ✓ Client Directed Case Management
- ✓ Systemic – Explore how to integrate services and programs

CASE MANAGEMENT

Case Management is *a collaborative process involving assessment, planning, facilitation and advocacy for options and service to meet an individual's needs.*

This is accomplished through:

- o Needs Assessment,
- o Communication,
- o Referral & Follow-Up

Case Management Services

- ◊ Women services – CMS
- ◊ Newcomer services – CMS, ICARE, HARTS
- ◊ Youth services – CMS
- ◊ Employment services – EOIS/CAMS/CMS

CIC FUNDED SERVICES

Expected Outcomes:

- 0 Increase understanding of life in Canada
- 0 Improve language skills
- 0 Improved ability to find employment
- 0 Improve connections to communities

SERVICES OUTCOMES

May also include:

- O* **Baseline information:** What's the status of client at the start of participation?
- O* **Progress information:** What's the status of client at the end of participation?

SYSTEM TOOLS

- ◊ CMS – Case Management System
- ◊ ICARE – Immigration Contribution Agreement Reporting Environment
- ◊ HARTS – History of Assessment, Referrals and Training
- ◊ EOIS/CAMS – Employment Ontario Information System Case Management

CASE MANAGEMENT SYSTEM

- 0 Client information: Who is accessing services?
- 0 Service characteristic: How the services are delivered?
- 0 **Scope** of service: What is being delivered?

ICARE

- 0 Client information: Who is accessing services?
- 0 Service characteristic: How the services are delivered?
- 0 **Scope** of service: What is being delivered?

HARTS

- 0 Client information: Who is accessing services?
- 0 Service characteristic: How the services are delivered?
- 0 Scope of service: What is being delivered?

EOIS/CAMS

- 0 Client information: Who is accessing services?
- 0 Service characteristic: How the services are delivered?
- 0 **Scope** of service: What is being delivered?

INTERVIEW PRACTICE

GROUP ACTIVITY

- Client and case worker
- Each program type will think of 3 questions specific to program and ask to client x

INTERVIEW

PURPOSE:

A meeting to ask questions

System tools to collect information may vary from program to program

Outcome the same: Get information to support goals

INTERVIEW

KEY POINT:

- Active listening not just hearing the words but understanding what is really being said

PRACTICE TOOLS

- 0 Maintain good eye contact and be aware of body language
- 0 Remember that verbal communication is a small percentage of effective communication so be aware of what is not being said
- 0 Voice intonation or body language

DEVELOP RAPPORT

- o Try and make the client comfortable
- o Determine if there is something of mutual interest that could be discussed before starting
- o Icebreaker – break the tension helps to relax the client

QUESTIONING TECHNIQUES

- Open-ended Questions: Get as much information as possible (avoid Yes/No questions)
- Settlement type interviews try to ask questions that will **specific details**
- Try to anticipate answers

COMMON INTERVIEW MISTAKES

- Talking too much – can not gather information if you are talking
- Client feels you are not interested in them
- Asking yes/no questions
- Not knowing the questions that require answering in the system
- Not knowing organization's goals and objectives

MISTAKES (Part 2)

- Accepting general answers – get them to explain goals and objectives
- Relying on memory instead of notes – take notes, detailed notes will help you identify service and resources

INTERVIEW PRACTICE

GROUP ACTIVITY

- Client and case worker
- Each program type will use same 3 questions used at the beginning of interview and ask client x
- Using what we have just learnt

ASSESSMENT

PURPOSE:

- Determines eligibility for services and assesses newcomers' needs, resources, strengths and barriers

ASSESSMENT KEY POINTS

- Identified needs by the clients and their priority
- Short and long term goals
- Family strengths & weakness
- Personal support

ASSESSMENT KEY

- 0 Agency support
- 0 Barriers to accomplishing
- 0 Follow-up plan
- 0 Who will be involved in **SERVICES**

MAIN DATA COLLECTED

Settlement:

- 0 Client information
- 0 Client served
- 0 Preferred official language of service

Employment Ontario -Participant types:

- 0 Client - person
- 0 Service provider
- 0 Employer
- 0 Educational institute

0 BY THE MINISTRY

WHY DO ASSESSMENT

- Connect clients to program and service
- Outcome – clients have timely, useful and accurate information needed to make informed settlement decisions
- Clients understand life in Canada
- Establish social and professional networks and engage and feel welcome in communities
- Successful integration

NEED TO KNOW

SERVICE DATA:

- 0 Service characteristics
- 0 Referred by
- 0 Start and end date, duration
- 0 Format (port of entry, family/individual/group)
- 0 Language of service
- 0 Number of people in session
- 0 Target group (e.g. seniors, women)

ASSESSMENT SUPPORTIVE SERVICE

Activities in this stream are almost always combined with other streams to achieve positive results

Activities: determine eligibility for service, assessing needs, helping to make informed settlement related decisions, and basing programming and referrals on client needs and goals.

- o Support Services contribute to the ability of clients to access the settlement services, such as child-minding (*previously available only for LINC clients*)

ASSESSMENT **W** SUPPORT

Two streams help facilitate newcomer's access to settlement services.

Provide assistance to access the program and services needed to help newcomers settle in their community

- o* Transportation; interpretation; and short/long term counselling to deal with settlement issues

BREAK



TIME MANAGEMENT

- Some actions may not be productive
- Inventory of wasting habits should be taken and ways to overcome them should be identified
- Share your techniques

POOR PRACTICE

- 0 Socialization prevents priority work
- 0 Everything must be done
- 0 Unproductive meetings
- 0 Changing priorities in midstream
- 0 Lack of knowledge
- 0 Task unclear
- 0 Unrealistic timetables

POOR PRACTICE

- o* Not having the authority to make decisions
- o* Micro management
- o* Not working as a team
- o* Not having control over outcomes
- o* Wasted time is money and time to clients

TIME management TASK

o **YOUR Individual** SKILLS

o CLIENTS

o **PEERS OR Group**

CAUSE OF POOR TIME MANAGEMENT

- o Telephone
- o Drop in visitors
- o Meetings/procrastination
- o Indecision
- o Paperwork

CAUSE OF POOR TIME MANAGEMENT

- o* Other people's priorities
- o* Firefighting (crisis and priority management)
- o* Being organized
- o* Delegation

SAMPLE ACTION PLAN

Notes	Action Item Description	Responsibility	Deadline
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CASE NOTES

Case notes are legal documents and represent both a record of and quality of services provided to clients

How to write case notes:

- O* Clear and brief
- O* Concise, precise
- O* Accurate and complete
- O* Timely, readable-acceptable grammar

PURPOSE OF CASE NOTE

- o **Assessment summary:** relevant and accurate information
- o **Case Note:** track and report progress and barriers
- o **Accountability:** to monitor and auditors
- o **Professional and ethical responsibility:** you have an ethical responsibility for service provided

RESPONSIBILITY

- o Information sharing: internal sharing of data and Individual Service Plan and external sharing for referral
- o Make sure you sign off on your notes, and clients always need to give you permission to share any information collected
- o Notation is understood by all – use language (**English or French**) understood by all

DOCUMENTATION

- o Describe behaviors reported by clients
- o Record statement of fact
- o Record your observation, using I statement
- o Substantiate conclusions and judgment
- o Link services and/or deficiencies

WE DON'T

- Abusive Anxious Demanding
- Immature Unfit Impulsive
- Irrational Resistant Troubled
- Distracted Suicidal Threatened
- Uncooperative Overwhelmed

Stay away from:

- Diagnoses, Clichés, Street talk, Jargon,
Stereotypes, Text Language and Prejudices

OUTCOME BASE- CASE NOTE

The team ties the goals and strategies of ISP to observable or measurable indicators of success, monitors progress in terms of these indicators, and revises the plan accordingly.

The team is accountable for achieving the goals laid out in the ISP. Outcome monitoring allows the team to regularly assess the effectiveness of the plan as a whole and to determine when the plan needs revision

TO TRACK RESULT OF

Modernized Approach Outcomes:

- A.* Orientation
- B.* Language/Skills
- C.* Labour Market Access
- D.* Welcoming Communities
- E.* Program and Policy and Development

PPRACTICE CASE STUDY

TEAM ACTIVITY

What are your issues?

DIVERSITY

PART A: Cultural Assumption

- What are they based on demographic served

PART B: Character Of Client Population

- Things to take into consideration when working with diverse groups
- Safe and inclusive environment

CULTURALLY COMPETENT

Team members demonstrate respect for and invest in building on the values, preferences, beliefs, culture, and identity of the child, youth and family, and their community.

The team should never leave a client in an awkward, undignified position

CHECK YOUR BELIEFS AND ATTITUDES

REFERRAL

- You contact a specialist in consultation with the client
- Ensure service agreement forms are signed (confidentiality)
- Ask what documentation is required for service, also ask the limitation of service
- Use the ISP to draft a brief profile of the client and the needs or issue

REFERRAL

- Faxed, emailed or in person speak to the referral source. Documentation of the conversation/referral need are denoted in the client's file.
- Clients are made aware of the referral, including the criteria for service. You may need to prepare the client for the meeting by providing them with a clear understanding of the service they will receive from the specialist.

ELECTRONIC OR PAPER FILE

CLOSING.....REMINDER

- 0 Cannot be re-opened once closed
- 0 Create **re-view** -some cases can not happen until 3, 6, 12 month review points
- 0 Points – follow up customer satisfaction
- 0 System change – according to end date in the system

CLOSURE ACCORDING TO

TEAM ACTIVITY:

What are the key areas and deadline dates for:

- 0 Women Service
- 0 Newcomer Services
- 0 Youth services
- 0 Employment

EXIT SPECIFIC SERVICES

What are the key areas and deadline dates for:

- O* Women Service
- O* Newcomer Services
- O* Youth services
- O* Employment

CLIENT EXIT

What **WAS** expected?

- According to mandate of each program
- Ensure system reflect any changes in service
- Did the client achieve most goals and objectives
- Did you achieve service goals?

FOLLOW-UP INCLUDES

- Follow-up should be a part of everyone client load
- Client will come to those who seek them
- Don't sit around and wait for it to happen

FOLLOW-UP

- Conclude a process
- Review new development
- As important as the initial contact
- Re-assure clients

FOLLOW-UP FOR SERVICES

What are the key areas and deadline dates for:

- O* Women Service
- O* Newcomer Services
- O* Youth services
- O* Employment

THINGS TO REMEMBER

- Provide service, program and support updates
- Use it to get outcome of services received
- Ask to provide feedback
- Ask how to improve
- Find out new issues to bring them back for service

MUST DO

- 0 Call clients according to mandate – 3, 6, 12 months
- 0 Get updated information – changes
- 0 Book an appointment if needed
- 0 Files should be current

COMMUNICATION

- O* Thank you note
- O* Call
- O* Send email
- O* Alternate calls and emails

Q & A / EVALUATION

o What more do you need